

# *Lodi Area Visitor Commission*

LODI AREA  
VISITOR COMMISSION  
AD HOC COMMITTEE

Mike Bennett  
San Joaquin Historical  
Society & Museum

Del Smith  
Wine & Roses Country Inn

Mark Chandler  
Lodi-Woodbridge Winegrape  
Commission

David Lucas  
The Lucas Winery

Beth Brouqsault  
Lodi Arts Commission

Charlene Lange  
Hutchins Street Square

Gwinnett Paden  
Friends of Lodi Lake

Shawna McCabe  
McCabe Creative Design

April 20, 1998


For a number of months a small ad hoc group has been meeting with the purpose of constructing a plan to continue the promotion of the Lodi area as a desirable destination for visitors. If you have received this letter, you no doubt already know that Lodi is a destination for visitors and that the benefits of cultivating this non-impact industry are innumerable for local businesses and our community as a whole.

Following our presentation to the City Council during a shirtsleeve session in February, the ad hoc committee has been working on firming up a plan, including a three-year budget, a job description for the new Visitor Commission staff person, and a plan to show widespread community support. This last part of the plan is very important.

The City Council needs to see a show of support from those in the community who are interested in partnering with the new Visitor Commission. This can be done in a number of ways. Sometime in the next few days, you will receive a call from one of us on the ad hoc committee to solicit your financial support and to request that you write a letter of support to the council or call a councilman. Your attendance is also needed at an upcoming council meeting (most likely in late May or early June) at which the Visitors Commission plan will be presented.

Please read the attached materials outlining how the Visitor Commission will be set up, and if you have any questions, you can call me or anyone listed at left. Thank you for your support of this important project.

Sincerely,



Shawna McCabe

McCabe Creative Design (past tourism committee chair)

# **Lodi Area Visitor Commission**

## **Mission Statement**

**The Lodi Area Visitor Commission will extend and enhance the hospitality of the Lodi Area to all visitors by promoting local events, activities, attractions and businesses, and coordinate the efforts of those entities to achieve the greatest financial, cultural and recreational return for the well being and advancement of the Lodi Area and its citizens.**

## **BACKGROUND**

In fiscal years 1996 and 97, the City of Lodi provided funding to initiate the development of a Conference and Visitor Bureau under the administration of the Lodi District Chamber of Commerce. Substantial work and momentum was achieved including a very successful inaugural Vines to Wine Tour and Crane Festival.

A group of citizens, representing Lodi Area Tourism attractions and interests, petitioned the City of Lodi to establish a Lodi Area Visitor Commission to continue the work started by the Conference and Visitor Bureau. The City of Lodi was also asked to provide a portion of the support for the continuation of the Lodi Area Visitor Commission to help conserve the momentum developed and firmly establish the function and benefits of the Visitor Commission.

## **GOALS AND OBJECTIVES**

### **GOAL I**

**To provide services for visitors that will attract them to the Lodi Area and cause them to extend their stay and make the highest use of the facilities, services, events and attractions in the Lodi Area.**

### **OBJECTIVES**

- Provide complete and accurate pre-visit information through telephone, internet and printed materials.
- Promote Lodi Area attractions, facilities and events through tourism marketing events and collaboration with other area tourism promotion organizations, Chambers of Commerce, recreational associations, cultural services organizations, statewide and national media.
- Provide information and visitor services through a local contact office, six days per week, directing visitors to local events and area businesses providing visitor accommodation and service.

## **GOAL II**

**To provide services for Lodi Area businesses, facilities, events and attractions that will measurably enhance attendance and patronage and provide and encourage collaboration between them, and acting on opportunities, represent the Lodi Area in trade shows, advertising media, news and electronic media.**

## **OBJECTIVES**

- Coordinate promotion and produce printed material with local businesses, attractions and events.
- Provide a forum for aggressive, area wide, promotional programs
- Dispense information to visitors on behalf of local businesses and attractions and events.
- Help “package” and coordinate visitor activities for specialized groups or special events.
- Develop measuring devices to gauge the effectiveness of the Visitor Services function.
- Coordinate and represent Lodi Area through participation in national and statewide tourism promotions and observances.
- Create and present such awards and recognition as will encourage and recognize exceptional individual and organizational effort toward achieving the purposes of the Commission.

Resolution  
(Legal boiler plate here)

Revised 04/13/98

Lodi Area Visitor Commission  
Executive Director Job Description  
April 17, 1998

Functional Responsibilities

Immediate

- Establish office, office systems, furniture, business information, official records, arrange clerical support, etc.
- Develop committee structure with city staff, commissioners, officers, and committee chairs.
- Become familiar with the region, its tourism-related events and other community assets.
- Establish effective relationships with owners and management staff at principal visitor-related businesses and organizations in the region.
- Establish communications to citizens of Lodi concerning activities of the Commission and its program.
- Train volunteer and paid staff.

Ongoing

- Work with commissioners, officers, and committee chairs to establish strategic and promotional plans.
- Act as program and promotion manager. Assure program conforms to and supports strategic goals. Assure timely completion of projects. Communicate results.
- Manage the Commission's activities. Arrange meetings. Develop agenda. Keep minutes and other official records. Support officers and committee leadership.
- Develop public relations strategy and maintain regular contact with the trade and popular media to enhance the tourism profile of the region.
- Act as liaison with the California Department of Tourism and the California Tourism Commission.
- Accumulate and distribute currently available brochures regarding visitor-related activities.
- Develop materials – print, audio, video and internet – to promote the region's attributes to current and potential visitors.
- Provide information to citizens of Lodi about Commission activities and accomplishments using public media and direct communication.
- Develop and monitor program budgets.
- Develop programs and events to educate the region's visitor related businesses about services and marketing methods to enhance value.
- Represent the Commission before local, regional, and statewide agencies, and at tourism related industry events.

Administrative & Finance

- Develop and manage community financial partnership program.
- Manage Commission payables, receivables, and accounting systems.
- Establish and manage budgeting systems. Develop information systems.

Measurement Criteria

- Track number of requests for information by type (office visit, phone, internet, etc.).
- Track number of industry meetings and trade shows attended and visitor leads developed from them.
- Track number of travel, tourism, and general press articles about Lodi, its events and activities of commission.
- Track number of local events and estimate attendance at them.
- Track business referrals and have businesses report % of sales from them.
- Conduct attitude survey now for benchline data; repeat in three years.
- Track membership numbers and partnership dollars, as well as grant funds attracted.

## **LODI AREA VISITOR COMMISSION**

Notes in support of the draft budget

04/13/98

These notes have been prepared to help the reader understand the draft budget. It is expected that this format will be a little different from traditional city formats and the chart of accounts will be new. The format and some of the income and expense objectives are arranged by function rather than by type. It was thought that evaluation tools could then be correlated with budget and program activity. The budget includes expectations for City support, earned revenue, private contributions and non-cash contributions that would account for donated services, material, labor at market value and housing within the new multi-modal station when completed. Temporary housing of the Commission would be available at Hutchins Street Square.

The values in some of the objectives are based on the operating expenses recorded by the Conference and Visitor Bureau. However most values are a product of realized business rates and proportioned based on the Stockton/San Joaquin Convention and Visitor Bureau budget as provided by Ann Sternal as part of the assistance provided by her operation and on the goals and objectives cited in the proposal for the establishment of the Visitor Commission.

The budget, dated July 1, 1998 thru June 30, 1999 includes projected income and operating expenses for the first year of operation. It is expected that some shifting of allocations will occur after the Commission is staffed, the members appointed and the fine tuning of programs has been accomplished in concert with City Administration. The first year budget includes substantial fixed asset and startup costs that will be sharply reduced or non-existent in subsequent years.

**Revenue** consists of the City support, donated and earned revenue, partnership support and non-cash or in-kind contributions.

- *Public Support*- includes the contribution of the City of Lodi as budgeted and approved by the administration and adopted by the City Council.
- *Private Support*- includes Partnership contributions, directed contributions of funds for program operation.
- *Earned Revenue*- includes revenue earned by revenue producing components of events such as fees for service, sales, and grants.
- *Non-Cash Contributions*- include donations of material, services, products, loaned staff, and volunteer labor as in-kind or non cash donations.

**General Expenses** consist of those costs resulting from employees and general office operations.

**Community Relations** includes those direct expenses related to informing and educating the residents and businesses of the Lodi Area and building on the effectiveness of the visitor services constituency of the Lodi Area.

**Tourism and Conference Promotion** includes expenses involved in preparing "packaging" of Lodi Area attractions, facilities and services, reaching markets outside of the Lodi Area and maintaining those contacts and services while the visitors are in the Lodi Area.

**Regional and Statewide Organizations** includes expenses necessary to maintain active involvement in tourism marketing organizations. This objective assumes cost sharing and

collaborations with Stockton/San Joaquin Convention and Visitor Bureau.

**Partnership** includes expenses incurred in marketing for and maintaining partners in the Lodi Area Visitor Commission.

**Events** includes direct expenses incurred in the promotion of Lodi Area Events such as Crane Festival, Vines to Wines, Fourth of July, Tournaments, exhibitions, and festivals that may be produced in the Lodi Area.

**Office Equipment and Maintenance** includes purchase, lease and maintenance of fixed asset items required by the Commission.

Specific definitions for the chart of accounts will be developed after the design and purposes are adopted, the commissioners are appointed and the commissioners have the opportunity to work with staff to fine tune the budget.

# BUDGET PROPOSAL-LODI AREA VISITOR COMMISSION

First full year 1998-99, and 1999-00, 2000-01

	Public	Private	Earned	Non Cash	1998-99	1999-00	2000-01
<b>REVENUE</b>							
City of Lodi	90,300				90,300	75,000	75,000
Partners		15,000			15,000	17,000	20,000
Products and Services				5,000	5,000	8,000	9,000
Events Income			2,000		2,000	2,500	3,000
Grants					0	5,000	5,000
Other Public Programs					0	5,000	5,000
In-Kind Materials/Services					0		
Advertising		2,000		29,700	31,700	30,000	30,000
Computer Svc				1,500	1,500	1,000	1,000
Office Help				30,000	30,000	30,000	30,000
<b>Total</b>	<b>90,300</b>	<b>17,000</b>	<b>2,000</b>	<b>66,200</b>			
<b>Total of all Revenue and Support</b>					<b>175,500</b>	<b>173,500</b>	<b>178,000</b>
<b>EXPENSES</b>							
<b>General Expenses</b>							
Salaries	52,600				52,600	53,650	54,723
Benefits	6,270				6,270	6,395	6,523
Payroll Taxes	5,018				5,018	5,118	5,220
Workers Compensation	800				800	800	800
Office Supplies	2,000	1,000			3,000	3,000	3,000
Telephone	2,000				2,000	2,000	2,000
Postage	3,000				3,000	3,000	3,000
Insurance							
Banking Fees	50				50	50	50
Professional Services		1,000		20,000	21,000	21,000	21,000
Hospitality Expense		1,000			1,000	1,000	1,000
General Mileage	400				400	400	400
<b>Total</b>	<b>72,138</b>	<b>3,000</b>	<b>0</b>	<b>20,000</b>	<b>95,138</b>	<b>96,413</b>	<b>97,716</b>
<b>Community Relations</b>							
Meeting Expense	600			750	1,350	1,350	1,350
Dues and Subscriptions	1,000				1,000	1,000	1,000
PR/Marketing				5,000	5,000	5,000	5,000
<b>Total</b>	<b>1,600</b>	<b>0</b>	<b>0</b>	<b>5,750</b>	<b>7,350</b>	<b>7,350</b>	<b>7,350</b>
<b>Tourism Conf. Promotion</b>							
Visitor Svc. Marketing	1,600	2,000			3,600	5,000	6,000
Trade Shows/Fees	1,500		1,500		3,000	4,000	5,000
Advertising/Publications	4,000	4,000			8,000	10,000	12,000
Mileage/Travel	2,600				2,600	4,000	4,000
Meeting Expense	500				500	500	500
Printing/Design		2,000	500	2,000	4,500	4,500	4,500
Exhibit Matrl/Design		1,000		5,000	6,000	6,000	6,000
Web Page Maint.				1,000	1,000	500	500
<b>Total</b>	<b>10,200</b>	<b>9,000</b>	<b>2,000</b>	<b>8,000</b>	<b>29,200</b>	<b>34,500</b>	<b>38,500</b>
<b>Regional/Statewide Organizations</b>							
Membership	1,000	1,000			2,000	2,000	2,000
Meeting Expense		500			500	500	500
Mileage/Travel		500			500	500	500



Total	1,000	2,000	0	0	3,000	3,000	3,000
<b>Partners, Dev. and Services</b>							
Marketing		3,000		10,000	13,000	13,000	10,000
Directory		800			800	800	800
Mileage/Travel							
Total	0	3,800	0	10,000	13,800	13,800	10,800
<b>Event Marketing</b>							
Crane Festival	2,000				2,000	2,000	2,000
Vines to Wines	300				300	300	300
Total	2,300	0	0	10,000	2,300	2,300	2,300
<b>Office Equip/Maint.</b>							
Furniture	3,000				3,000	500	0
Copier	2,800				2,800	2,760	2,760
Small Tools	2,000				2,000	100	100
Computers, printer, scanner	6,500				6,500	500	100
Software	1,000				1,000	500	100
Total	15,300	0	0	0	15,300	4,360	3,060
Section Totals	102,538	16,300	2,000	63,000			
Total of all Expenditures and Services					183,838	161,723	162,726